

Quick Start Guide For Accounting & Finances

Welcome to Aplos! Below is a list of recommended steps to help you get started. Each step provides a resource that covers the process in more detail. If you have any questions, contact our award-winning Support Team at (888) 274-1316 or aplos.com/support.

Import New Contacts

Choose File No file chosen

Upload a file (.xlsx, .xls, .csv, or .txt")
n.b. TXT must be tab separated

UPLOAD FILE

Step 1: Add Your People

It's easy to import contacts in Aplos! If you have an Excel file of your donors and/or vendors, along with their contact information, our contact import tool can quickly bring those details into your account.

www.aplos.com/support/articles/importing-contacts

Chart of Accounts ⚙

Funds

- Allocate
- Office
- General Fund
- Grants
- Building
- Payroll

+ Add Fund

Step 2: Edit Your Chart of Accounts and Set Your Starting Balances

By default, you have a basic chart of accounts that you can edit to reflect your preferred structure. You'll want to set the starting balances for any of your asset or liability accounts so your register balance matches your bank. These starting balances should match your bank account as of the first transaction you enter in Aplos.

www.aplos.com/support/articles/nonprofit-chart-accounts/

www.aplos.com/support/articles/coa-setup

Budgeting

Add Budget +

Year:

Budget by Tag:

To create an organizational budget (by fund), leave this field blank.

add **cancel**

Step 3: Create Your Budget

Setting up your budget will help you project income and expense goals for your fiscal year. As you enter transactions, you can run budget reports to see if you're spending and/or revenue are matching your goals.

www.aplos.com/support/articles/budgeting



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Purposes + IMPORT ▾

SHOW ACTIVE SHOW ALL

Displaying 1 to 2

Sequence	Name	Description	Partner	Linked to Accounting?
	Name:	Description:		Disabled: <input type="checkbox"/>
	Sequence: <input type="text" value="1"/>			
Track this purpose in Accounting? <input checked="" type="checkbox"/>				
	Income Account: <input type="text" value="-- Select an account --"/>	Fund: <input type="text" value="-- Select a fund --"/>		
* Required				
SAVE CANCEL				

Step 4: Create and Link Your Purposes

To track donations and prepare contribution statements in Aplos, you need to create purposes in the Donations section. You can then link those purposes to the related accounts in your accounting if you want your contribution deposits to also post in the bookkeeping.


www.aplos.com/support/articles/purposes

Your Template: Year End <https://www.aplos.com/aws/give/DoingGoodStuff/yearend>

Colors ▾
Logo & Main Image ▾
Donor Information ▾
Donation ▾

Internet Address: NEXT >
SAVE
PUBLISH
PREVIEW
EXIT

Year End Campaign



Thanks to your generosity we have done so much Good Stuff this year! Help us do even more Good Stuff in the future!

Your Information

First Name* Last Name*

Email*

*required field

Step 5: Online Donation Form

Giving people a recurring donation option will help keep your donations more predictable. Once you create your Aplos online donation form, you can share it with your supporters or add it to your website so people can set up a weekly or monthly recurring gift to your organization.

www.aplos.com/support/articles/online-donations

Users ADD USER

Name	Email	AWS Status	AWS Roles
Daniel Van Gerpen <small>(your user)</small>	daniel@aplossoftware.com	enabled	Administrator: Full access to entire software.

Accountants

If you have an outside accountant or bookkeeper who reviews your books, you can add them to your organization by contacting support@aplos.com and we will be happy to assist you. You currently do not have any accountants associated with your organization.

Create Group

Group Name* Timezone

Group Admin Options

Allow group admin to add existing contact as member Allow group admin to add new contact as member

Member Administration Options

Allow non-administrators to send emails Allow administrators to edit their own profile

Allow administrators to edit member profiles Member details viewable to non-administrators

Step 6: Invite Other Users

You can share access with the rest of your team by adding them as users with role permissions in the Settings section. You can also create a Group or Team for your board or volunteers from any contact in your People section and invite them to a private group portal to schedule meetings, share documents, and sign up for volunteer opportunities.

www.aplos.com/support/articles/settings-adding-managing-users

www.aplos.com/support/articles/groups-and-teams-getting-started



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